



ONE YEAR SINCE THE UKRAINE WAR... WHAT HAS CHANGED IN THE MIDDLE EAST?

POSITION PAPER
REGIONAL POLITICS

APRIL 2023

Summary

- With the escalation of the US-China rivalry, the Russo-Ukrainian war has slowed down or even stopped the United States' endeavor to renege its commitments in the Middle East. The priorities of Washington have shifted towards preventing the expansion of Russian and Chinese influence in the Middle East and ensure the loyalty of its allies, which prompted the Biden administration to demonstrate more seriousness about the American commitment to the security of the Gulf states.
- The structural changes affecting the global energy markets following the Russian invasion of Ukraine prompted China to expand its relations with the Gulf countries, which are rich in energy resources. This is one of the indicators of the growing Chinese influence in the region, as demonstrated by China's mediation in the agreement to normalize Saudi-Iranian diplomatic relations.
- The Gulf countries seek to maintain a neutral position regarding the war. For instance, they did not endorse Western sanctions and preserved their relationship with Moscow. However, they also responded to Western requests to support Ukraine through sending generous humanitarian aid and military aid "in secret."
- The Ukraine war has enabled the KSA to regain its pivotal position in the global energy market. Additionally, Riyadh has regained momentum on the global geopolitical level. The Saudi approach to deciding the policies of OPEC+ reflects the confidence of Crown Prince Mohammed bin Salman in managing the relationship with Washington.
- Turkey has achieved a difficult political equation through its 'balanced' policy towards the war in Ukraine. Accordingly, Ankara not only underlined its geopolitical importance to the West but also preserved its interests by maintaining friendly relations with Russia. Such a balance is consistent with Ankara's willingness to become more politically independent from the West while maintaining peaceful relations and a strategic military alliance with it.
- The Ukraine war has motivated Iran and Russia to strengthen their ties, as both parties have a common desire to weaken the U.S. hegemony. Nonetheless, the Russian-Iranian relations are still tactical in nature, and are based on the interests of each party and their timely relations with the West. However, given the emergence of common challenges, this relationship could develop and become strategic.

- The repercussions of the Ukraine war have accelerated the deterioration of the Egyptian economy, which was already troubled. Moreover, the heavy reliance of Egypt on the Gulf countries will further weaken Cairo's regional influence. Given the ongoing economic pressures, there are growing concerns related to the social stability of the country.
- Israel is seeking to preserve its understandings with Moscow on major security issues related to Syria. In light of the growing Russian-Iranian military cooperation and the continued U.S. pressure on Tel Aviv to further support Kyiv, Israel's efforts to maintain a balance between the two sides may be disrupted.

One year after the Ukraine war... the Middle East seeks a delicate balance between the West and Russia

- A year after the Russian invasion of Ukraine, significant repercussions can be felt in international politics and in the Middle East. The war has uncovered the complexity of political calculations faced by the regional powers following the intensification of the international conflict between the United States and its Western allies on the one hand, and Russia and China on the other hand. The war also impacted the geopolitical weight of the regional powers and the dynamics that rule the relationship between countries in the region and international powers.
- The response of the regional powers to the war in Ukraine was discordant with the positions of the Americans and Western countries. They avoided the adoption of a firm stance against Russia to preserve their direct interests with Moscow. Instead, they tried to adopt a balanced position between the two sides by denouncing the invasion and reaffirming the sovereignty of Ukraine. They also shunned the imposition of sanctions on Russia or "openly" providing military assistance to Ukraine. Instead, they only offered humanitarian aid to Kyiv. The only exception was Turkey, whose military ties with Ukraine precede the war.
- The countries of the Middle East supported the United Nations General Assembly resolution condemning Russia's invasion of Ukraine, with the exception of Syria - which voted against it - and the abstention of Iran, Algeria, and Iraq. They also adopted the resolution of the United Nations General Assembly, which rejects the annexation of parts of Ukraine to Russia. At the same time, the region's countries - including Turkey, the

KSA, the UAE, and Egypt - abstained from supporting the economic isolation of Russia without challenging Western sanctions related to the supply of specific components to Moscow. Besides, most of these countries refrained from supporting the suspension of Russia's membership in the United Nations Human Rights Council, except for Libya, which endorsed the resolution. As the war continues, Turkey and the Gulf countries provide their economic support, whereas Iran and Algeria offer their military support to the belligerent parties.

■ The rise in economic inequality among the Middle East countries is a major consequence of the war. While the Gulf countries reported record profits from oil and gas exports revenues, other countries in the region - particularly Egypt, Jordan, Tunisia, and Lebanon - are confronting severe economic crises because of the increase in energy and commodities prices. Turkey is also witnessing record inflation rates, while Iran is facing an economic crisis following the tightening of sanctions on the country. These developments have triggered an increase in the economic competition between the countries that have achieved huge profits, such as the KSA and the UAE, and resulted in political tensions between the KSA and Egypt because of disagreements on the way and means to provide financial support.

Washington refocuses on the Middle East amidst fear of the expansion of the Russian and Chinese influence

■ With the escalation of the US-China rivalry, the Russo-Ukrainian war has slowed down or even stopped the attempt of the US to renege its commitments in the Middle East. Washington's priorities focus on preventing the expansion of Russian and Chinese influence in the Middle East and impeding the development of military, technological, and strategic cooperation between the regional powers and Russia or China. Therefore, the United States is demonstrating more commitment towards ensuring the security of the Gulf states and its Arab allies in general by boosting its regional allies' to prevent their need to develop military cooperation with Washington's opponents.

■ Washington seeks to maintain a peaceful geopolitical environment in the Middle East and avoid tensions with its allies in the region to focus on other areas of conflict with China and Russia. In this context, Washington announced in the National Security Strategy Document, which comprises five axes and was issued last October, its commitments towards the Middle East. The document underlines the role of Washington towards

maintaining security in the region, which involves promoting regional integration and ensuring the security of its allies from regional and external threats. Furthermore, it also addressed the adoption of an approach that is based on diplomacy, building partnerships and alliances, and supporting the efforts of the region's regimes to achieve stability.

China strengthens its ties with the Gulf to secure energy supplies

■ The structural changes that the global energy markets have witnessed after the Russian invasion of Ukraine [prompted China](#) to strengthen its relationships with the Gulf countries, which are rich in energy resources. These ties not only extended to the KSA but also included Qatar, with which China has signed a [strategic agreement for the supply of liquefied natural gas](#) over the period of 27 years. The strategic goal of China is to secure the flow of oil and gas in case tensions over Taiwan are translated into Western sanctions. By receiving energy supplies from the Gulf, Beijing can negotiate maintaining [the price of Russian oil imports](#) at their lowest levels.

■ China is seeking to strengthen its geopolitical role in the Middle East while respecting two basic principles. The first is maintaining a [balanced relationship with Iran and the KSA](#). In this framework, Beijing has made a big step forward by playing the role of [mediator](#) in the agreement to normalize Saudi-Iranian relations. The second is maintaining the security equation in the region, which is still controlled by the Americans. Beijing benefits from Washington's role in the region as a guarantor of security and stability because this protects China's economic interests without forcing it to get further involved in costly security engagements.

The Russian military system is losing its appeal

■ In recent years, Moscow has tried to reinforce its influence in the Middle East and North Africa by promoting the sale of modern Russian weapons as an alternative to American weapons, which are more expensive and are subject to conditions related to the preservation of human rights and advancing democracy. Russian weapons were particularly promoted during Moscow's military intervention in Syria, which served as an arena to advocate for them. However, the war in Ukraine will most properly result in the decline of the role of Russia as a weapon supplier in the region because of the following:

- First: The war in Ukraine has demonstrated that the Russian military systems, which capacities were overstated by Moscow, are not as efficient as the Western weapons in the battlefield. For instance, many Russian attacks hit civilian infrastructure rather than high-value military targets. This indicates the inaccuracy of Russian long-range missiles and artillery and their ineffectiveness. The failure rate of Russian missiles is estimated at around 60% or more. After being targeted during the war by low-cost weapons, such as drones, the Russian air defense systems are no longer perceived as an alternative to Western ones.
- Second: the severe Western sanctions and the war of attrition have resulted in Russia facing a shortage of military and logistic supplies, which has led to a severe decline in its defense industry, particularly that related to advanced electronic components. This is what is prompting Moscow to rely further on Iranian drones. Consequently, the unsatisfactory performance of Russian weapons during the war has had a negative impact on Russia. This affected the strategic role of Russian weapons and made Moscow lose its attractiveness as a weapons provider in a crowded market that includes traditional suppliers, such as the United States, China, France, and Germany, as well as rising suppliers, like Turkey and Israel.

The Gulf... Increased geopolitical and economic gains

- The Ukraine war occurred at a time during which Saudi-American and Emirati-American relations were in a stage of re-evaluation after the US policy raised concerns related to the commitment of Washington to play its role as the sponsor of regional security in the past years, particularly following its abrupt withdrawal from Afghanistan and the inappropriate and untimely reaction of Washington to the Iranian-backed attacks on Saudi and Emirati territories. This motivated Riyadh and Abu-Dhabi to establish relations with various global actors, as well as promote their security and economic ties with other partners - including Russia and China. As such, they became more independent from the United States, even though they renewed their security and military partnership with Washington and attempted to establish clear agreement frameworks that are supported by the Congress, and which are therefore not modified with the change of administration in the White House.

■ The Gulf states are trying to maintain a balanced position regarding the war in Ukraine. In this context, they have shunned Western sanctions against Russia. Furthermore, the KSA has turned down American requests to increase its oil production as well as rejected the controversial decision of OPEC+ to reduce its production. Even though these countries were eager to preserve their ties with Moscow, they also responded to the Western's call to support Ukraine. Accordingly, the Gulf countries have sent generous humanitarian aid to Kyiv. Moreover, secret military aid that included Mistral anti-aircraft systems was sent by the UAE, the KSA, and Qatar; and the UAE, the KSA, and Egypt also provided Ukraine with Crotal surface-to-air missiles. Finally, these countries exerted diplomatic efforts to release Western and Ukrainian prisoners from Russian prisons.

■ The need for Washington to guarantee the loyalty of its allies prompted the Biden administration to demonstrate more commitment to the security of the Gulf states. This was manifested by the hosting of Riyadh last February, of high-level meetings between the United States and the Gulf Cooperation Council countries, such as the "Working Group on Integrated Air and Missile Defense and Maritime Security" meeting, the "Working Group on Iran" meeting, and the "Counter-Terrorism Working Group" meeting, which establish broad US-Gulf coordination regarding a spectrum of security threats that are considered a priority by the Gulf states.

■ **The KSA:** As a result of the Ukraine war, the KSA has regained its central position in the global energy market. This was manifested by the respective visits of Western leaders to Riyadh, including the US President, the British Prime Minister, and the German Chancellor, which ended the international apathy towards the Saudi Crown Prince. Accordingly, Riyadh reclaimed much of its geopolitical weight on the international level and obtained huge profits from oil exports during the year 2022, which were equivalent to 326 billion dollars. In addition, the KSA can strongly influence the decisions of OPEC because it can influence the positions of the UAE and Kuwait. Furthermore, there is a growing cooperation with Russia within the OPEC+ Alliance, which resulted in two decisions to cut production in October 2022 and March 2023. The Saudi approach to deciding the policies of OPEC+ reflects the confidence of Crown Prince Mohammed bin Salman in managing the relationship with Washington. Such an approach is based on the country's position as the world's largest oil exporter and the coalition leaders' growing sense of independence when making decisions that serve their interests.

■ **The UAE:** The UAE has reclaimed its strategic position as one of the providers of global energy supplies, as demonstrated by the [agreement](#) with Italy, even though the revenues of Abu Dhabi from oil and gas exports were less than those achieved by Riyadh or Doha. The war in Ukraine also contributed to reinforcing the role played by the UAE in foreign policy, which was manifested through its attempt to achieve a balance between the changing alliances and play the role of mediator between Russia and Ukraine. Moreover, the UAE increased its focus on [regional diplomacy](#) to underline its pivotal role in the region. This comes within the framework of the [zero-problem](#) and reducing external tensions policy adopted since late 2019 by the UAE.

■ **Qatar:** The country has achieved huge economic gains following the expansion of its exports of liquefied gas to the European Union, which amounted to about [\\$86.8 billion](#) last year. Qatar is expected to achieve significant gains at the regional and international geopolitical levels because its gas exports particularly promote Doha's [strategic partnership](#) with Washington. Additionally, Qatar's significant contribution to [European energy security](#) increases its political influence within the European Union. The country has also signed a [strategic agreement](#) to provide China with liquified gas. Following the Russian invasion of Ukraine, Qatar's central role on the global energy security level will enable Doha to strengthen its diplomatic role in regional and international files.

Turkey strengthens its international geopolitical position

■ Turkey has achieved a difficult political equation through its '[balanced](#)' policy towards the war in Ukraine, which underlines Ankara's critical geopolitical position to the West in the face of Russia on the one hand, while maintaining friendly relations with Russia that serve Turkey's interests on the other hand. During the war, Ankara's international diplomatic efforts promoted the position of Turkey as a [strong mediator](#) between the West and Russia. In this context, the mediation of Ankara encouraged Russia to rejoin the grain export deal. Moreover, Turkey hosted a rare meeting between the US and Russian intelligence chiefs. At an earlier stage, Ankara played the role of mediator for a high-level exchange of 270 prisoners between Russia and Ukraine.

■ Based on its 'balanced' policy on the war, Turkey sought to make economic gains by welcoming Russian tourists and Russian investors and businessmen who may find Turkey a suitable environment for them, given the Western sanctions expected to last. Moreover,

the Turkish approach enabled Russia to maintain important relations within Europe that serve its tactical interests, in light of the Western mobilization against Moscow while providing Russia with alternatives to the European markets. Finally, the Turkish market is one of the most important receivers of Russian energy imports.

■ The ‘balanced’ policy adopted by Turkey regarding the war in Ukraine can be understood in the context of Ankara’s venture to set the ground for a foreign policy that is more independent of the West while not being hostile to it, as Turkey is seeking to maintain its strategic military alliance with the West. Turkey’s setting conditions for Sweden’s admission to NATO should be read within the context of Ankara’s desire for all NATO members to adopt a positive stance towards its national security and the military operations it is carrying out against the PKK and YPG/SDF in Iraq and Syria. Turkey does not aspire to restrain its broad economic relations with the West. On the contrary, Ankara wants to leverage its security and economic relations with its Western allies by entering broader alliances to prevent facing pressures from its allies and enemies alike.

Iran... Strengthened alliance with Russia and strained relations with Europe

■ The Ukraine war incited Russia and Iran to cement their relations further. While Tehran seeks to overcome Western restrictions and threats, Moscow needs strong regional partners to counter the economic isolation that the West seeks to impose on Russia. Moscow and Tehran also share a common desire to weaken the US hegemony by pushing for the establishment of a multipolar international system.

■ It is too early to describe the Iranian-Russian relations as a strategic alliance because they have different positions on “Israel” and the future of Syria. Moreover, both countries compete over the hegemony in Central Asia and the export of gas and oil to international markets. Also, each party is using its relationship with the other as a bargaining chip with the West, just like they both did during previous periods of rapprochement with Western countries. Therefore, their relations are momentary and linked to the self-interests of each country, and the nature of its relations with the West. Nonetheless, given the emergence of common challenges, the relations between the two countries could develop and become strategic.

■ Tehran’s supply of drones to Russia for its war in Ukraine as well as the repression of protests in Iran, aggravated the relationship between Iran and Europe. This prompted

the European bloc to focus on tightening sanctions on Tehran, including threatening to list the Iranian Revolutionary Guard as a terrorist organization rather than resuming the nuclear talks that were stopped since the beginning of the war.

- Washington and Europe are still willing to reach a nuclear deal with Tehran through diplomatic channels. However, Iran's continuous development of its nuclear program, its imposition of strict conditions to restore the nuclear deal (such as obtaining Congress's approval), and its military support to Russia are major factors in determining scenarios for the Western approach towards Iran. As such, the military option is no longer excluded to prevent Iran from acquiring nuclear weapons.

Egypt... further erosion of regional influence

- The repercussions of the Ukraine war accelerated the deterioration of the Egyptian economy, which was already troubled. The war resulted in a wave of global inflation that prompted the U.S. Federal Reserve to continuously raise interest rates, causing more than \$20 billion in hot money to leave Egypt, which relied for years on short-term loans. The war also negatively affected the Egyptian tourism sector following the decline in the number of Russian and Ukrainian tourists (who represent about 30% of tourists visiting Egypt each year), which led to a decrease in the influx of foreign currency to Egypt.

- The Egyptian government turned to the International Monetary Fund, which provided a small loan of no more than 3 billion dollars. The latter will be an incentive for another financing worth 14 billion dollars, which will be provided through selling sovereign assets to Gulf states rather than as assistance or aid. Cairo had announced earlier its plans to sell state-owned assets or shares to inject billions of dollars back into the Egyptian economy.

- The broad dependence of Egypt on its partners in the Gulf, particularly the KSA and the UAE, contributes to the diminished regional influence of Egypt. This is mainly because strategic investments and deposits from the Gulf countries are, to a large extent, preventing or slowing down the deterioration of the Egyptian economy. As a result, Egypt's positions on regional issues are influenced by those of the KSA and the UAE, and Cairo is unable to adopt regional policies that are different from those of its Gulf allies. Nonetheless, because of the ongoing economic pressure, there are growing concerns about social stability in the country.

Israel... difficult choices between Russia and the West

■ “Israel” tried to embrace a balanced position between Russia and the West, which made it face difficult decisions. On the one hand, “Israel” avoided taking a strong stand against Russia, despite supporting the condemnation of the Russian invasion of Ukraine at the United Nations, nor did it endorse Western sanctions against Russia. On the other hand, in response to American pressure, “Israel” offered diplomatic and financial support to Ukraine. The position of “Israel” is based on its desire to maintain the security understanding with Moscow regarding Syria because Russia controls the Syrian airspace. Accordingly, coordinating with Moscow is of high priority for “Israel” because it authorizes it to launch airstrikes on Iranian targets in Syria and reduce the growing Iranian military threat in the country.

■ The degree of tension between “Israel” and Russia will be determined by two major factors during the war:

■ First: the extent of the development of Russian-Iranian relations, which could result in some restrictions by Moscow on Israeli activities in Syria and preventing it from targeting Iranian infrastructure in Syria. In addition, promoting the military cooperation between Moscow and Tehran would boost the offensive capacities of Iran, in particular if Russia provided Iran with Sukhoi fighter jets (Su-35 Flanker M) and fifth generation missile technology, which would increase the Iranian threat to the security of “Israel”.

■ Second: The military and technical support that Israel can provide to Kyiv. In February, during his visit to Kyiv, Israeli Foreign Minister, Eli Cohen, announced that his government will support Ukraine in developing an intelligent early warning system to detect missiles. However, this system is incomparable with the Iron Dome system, which Ukraine has been demanding since the onset of the war. With the increasing American and Western pressure on “Israel” to provide military aid to Ukraine, “Tel Aviv” may have to respond to the Ukrainian request.



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Address: Istanbul Vizyon Park A1 Plaza
Floor:6 No:68 Postal Code: 34197
Bahçelievler/ Istanbul / Turkey
Telephone: +902126031815
Fax: +902126031665
Email: info@sharqforum.org